



CCS Guide to Assigning and Managing OTPs

MDH ISAS Team

09/15/2020

Quick Overview of the ISAS IVR

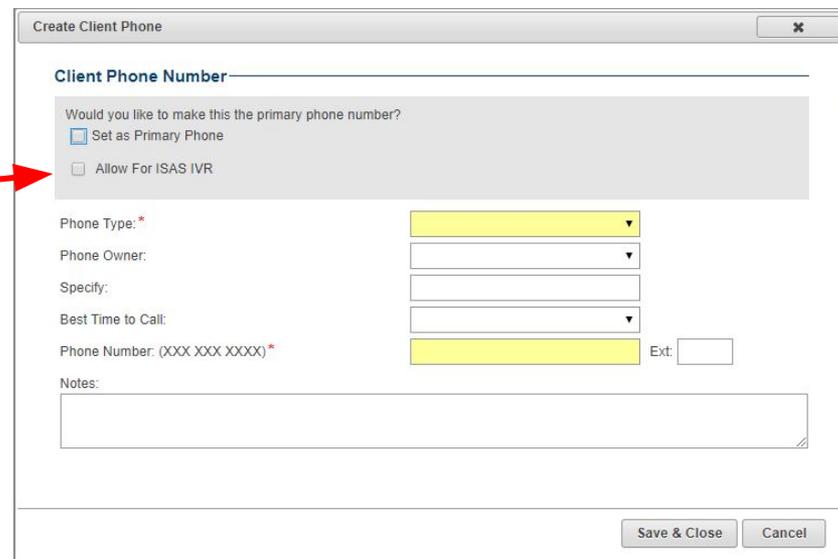
- In-Home Supports Assurance System (ISAS) is Maryland's EVV System
- ISAS has been in-use since 2013
- Used by:
 - CFC Residential Service Agencies (11,000 participants)
 - DDA Personal Supports Providers (13 Pilot participants)
 - Full DDA Use by December 2020 (4,500 participants)
- Integrated with LTSSMaryland as the pre-authorization and billing solution for services requiring EVV

Two ways ISAS identifies the participant

- 1. Direct Support Professional (DSP) uses participant's personal landline or cell phone**
DSP calls from a phone # that is in the LTSSMaryland Client Profile
- 2. DSP uses any phone and a small key fob called a One Time Password (OTP) device**
DSP calls from a phone # that is not in the LTSSMaryland Client Profile. DSP would need either a) the **9 digit OTP serial code** or b) the participant's **11 digit MA #**

Managing Participant Phone

In the LTSSMaryland Client Profile page, CCS can manage participant's phone numbers to allow DSP to use that phone # to Clock-in and Clock-Out



The screenshot shows a web form titled "Create Client Phone". At the top, there is a section "Client Phone Number" with a question: "Would you like to make this the primary phone number?". Below this question are two checkboxes: "Set as Primary Phone" (unchecked) and "Allow For ISAS IVR" (unchecked). A red arrow points to the "Allow For ISAS IVR" checkbox. Below the checkboxes are several input fields: "Phone Type:" (a dropdown menu with a yellow background), "Phone Owner:" (a dropdown menu), "Specify:" (a text input field), "Best Time to Call:" (a dropdown menu), and "Phone Number: (XXX XXX XXXX) *" (a text input field with a yellow background) followed by "Ext:" (a text input field). At the bottom of the form is a "Notes:" section with a large text area. The form has "Save & Close" and "Cancel" buttons at the bottom right.

Select "Allow for ISAS IVR" only if that phone belongs solely to the participant and **NOT** to a provider

What are OTP Devices?

- One Time Passcode (OTP) Devices are used to assist with the clock-in out process when a phone is not available.
- OTP devices generate a time-synchronized randomized 6-digit code every 60 seconds.
- **Direct Support Professionals (DSP)** will use that code when calling the ISAS telephonic system.
- OTP devices do not replace the ISAS telephonic phone system but work in conjunction with the system.
 - A telephone is still **required** to clock in and out using ISAS

OTP Device



Requesting new OTP Devices

Actors: CCS Management

Supervisors should request new devices by

1. Emailing the ISAS team at mdh.isashelp@maryland.gov
2. Using the OTP request google form, found [here](#)

When to assign OTPs

OTPs should only be assigned when Direct Support Professionals (DSPs) frequently do not have access to a suitable phone owned by the participant:

1. Participant does not have a reliable phone that the DSP can use
2. More than one participant lives in the same household and they share one phone
3. The participant often receives Personal Supports services in the community and the participant does not have an accessible mobile phone
4. The participant does not have a MA # (state funded participants)

NOTE: The CCS should always assess the situation prior to assigning a device and should not rely solely on the DSP or Agency's word that an OTP is needed

OTP Delivery

The CCS should deliver OTP devices to each participant in person or via mail

- We recommend that devices are assigned to the participant **before** they are delivered
- Mailed devices should be padded for protection

Payment for OTP delivery

- DDA will reimburse CCS agencies for costs associated with shipping OTP devices **only for the initial launch of EVV.** This reimbursement will not be available after the initial go-live
- Individual CCSs may bill for OTP assignment and in-person delivery within the LTSS Activities module

How to Assign OTPs to a Participant

Home | Client

Client OTP Assign

OTP Serial Number:

ID: [redacted]
MFP Eligible: N (11/06/2019)

Patrick

- Client Demographics Edit
- Medicaid # Manage
- Phone # Manage
- Address Manage
- Representatives Add Representatives
- Strengths Manage
- Goals Manage
- Client OTP** Assign

OTP Serial Number:

Client

- Profile
- Client Summary
- MMIS Info
- MDS Data
- Client Notes

Case Management

Programs

MFP

Surveys

Client

- Profile
- Client Summary
- MMIS Info
- MDS Data
- Client Notes

Actors: CCS Staff

1. In the Client Profile select **Profile** → **Client OTP** → **Assign**

How to Assign OTPs to a Participant (cont.)



Assign Client OTP

OTP Details

OTP Serial Number: *

One Time Password: *

OTP Assignment Reason: *

--Select--

- Client does not have a reliable phone
- Client lives in an area with poor phone reception
- More than one client shares the same phone number
- Direct services are often provided to the client in the community
- Other

Note: "Other" may be used for state funded participants since there is no dropdown option for Client has no MA#

2. Enter the 9 digit OTP Serial Number located on the back of the device.
3. Enter the 6-digit password that appears on the front of the device.
Note: The numbers will change every 60 seconds.
4. Select the reason why the device was assigned from the drop-down menu, then select Save & Close.

Possible Error Messages when assigning OTPs

Error: OTP device cannot be assigned because it is in Inactive Status

Assign Client OTP

Error: OTP device cannot be assigned because it is in Inactive status.

OTP Details

OTP Serial Number: *

One Time Password: *

OTP Assignment Reason: * Client does not have a reliable ph ▾

Save & Close Cancel

The CCS should contact the ISAS team by email at mdh.isashelp@maryland.gov and ask them to activate the device. They should provide the OTP Serial Number located on the back of the device. A different device may be used while following up with ISAS

Error: Current OTP device has already been assigned to a client - [Insert Client ID]

Assign Client OTP

Error: Current OTP device has already been assigned to a client -

OTP Details

OTP Serial Number: *

One Time Password: *

OTP Assignment Reason: * Client does not have a reliable ph ▾

Save & Close Cancel

The CCS should un-assign the device from the incorrect participant and then proceed to assign the device to the correct participant.

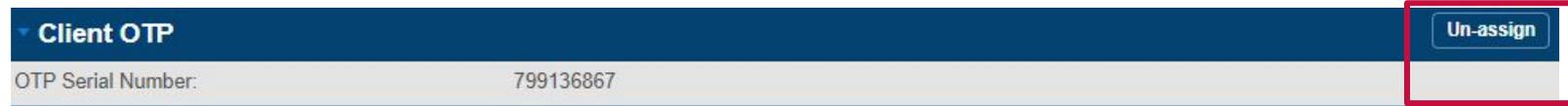
Un-assigning OTP Devices

1) Navigate to Client Profile



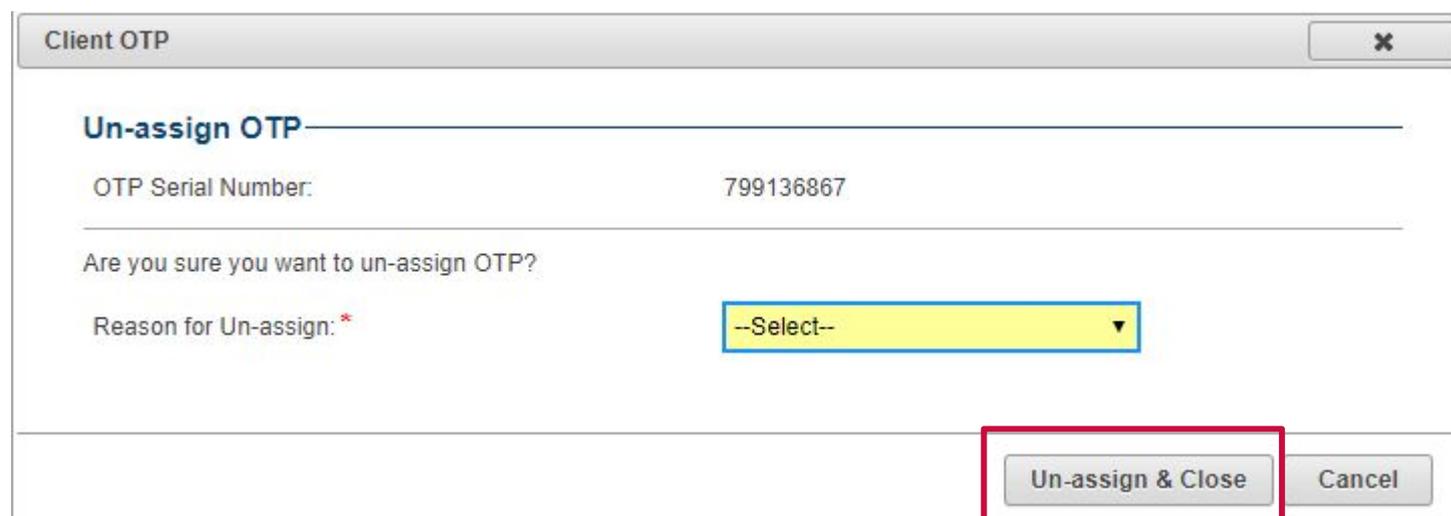
A navigation menu with two items: 'Client' and 'Profile'. 'Client' is highlighted in blue with a white downward arrow on the left. 'Profile' is in a grey bar with a white rightward arrow on the right.

2) Select Client OTP - Un-assign



A header bar for 'Client OTP' with a blue background and white text. Below it, a grey bar shows 'OTP Serial Number: 799136867'. On the right side, there is a blue button with white text that says 'Un-assign'.

3) Select Reason for Un-assigning from the drop down



A dialog box titled 'Client OTP' with a close button (X) in the top right. Below the title is a blue header 'Un-assign OTP'. The dialog contains the text 'OTP Serial Number: 799136867' and the question 'Are you sure you want to un-assign OTP?'. Below this is a label 'Reason for Un-assign: *' followed by a yellow dropdown menu with the text '--Select--'. At the bottom, there are two buttons: 'Un-assign & Close' and 'Cancel'.

4) Un-assign and close

Reasons for Unassigning OTPs

Client OTP ✕

Un-assign OTP

OTP Serial Number: 797463978

Are you sure you want to un-assign OTP?

Reason for Un-assign: *

- Select--
- Select--
- Can be Reused - OTP no longer needed by Client
- Can be Reused - Client Disenrolled
- Lost Device - Unknown
- Lost Device- Stolen by Staff
- Lost Device- Lost by Client
- Broken Device - Reported time is incorrect
- Broken Device - Device is broken
- Broken Device - Battery Dead
- Other

Cancel

Important Notes about OTPs

- The CCS should confirm the need for OTPs directly with the participant
- The OTP device must ALWAYS be in the participant's possession in order to support provider billing and prevent fraud
- The CCS should ask about the OTP device when in contact with the participant to ensure it was not taken, lost, or broken.
- Lost, broken, and removed devices should be documented in Activity notes
- If the CCS finds out that the OTP was removed from the participant's possession by the Direct Support Professional, the CCS should report this to MDH and assign a new OTP device. If the device is later found, return it to MDH.
- If an OTP device breaks, the CCS MUST collect the device from the participant, unassign the OTP device from the participant's profile and return the device to MDH
- The CCS is responsible for **physically** delivering and retrieving OTP devices from the participant
 - Do not make Participants come get devices

Communicating about OTPs

Case managers are often first in line for questions about services. Some helpful facts include:

Tips for Participants:

1. OTPs are provided free by the state
2. OTP devices should be available to the DSP at the beginning and end of each shift
3. OTP devices must remain in the participant's possession at all times
4. DSPs or agency providers may not remove the OTP from the participant's possession. OTPs must be available for any provider giving service to the participant
5. Report missing or broken devices immediately to the CCS

Tips for Service Providers:

1. Devices must stay with the participant
2. The serial number is found on the back of the device. It may be needed for clocking in and out



OTP Drift

- 1. Important Note:** Devices will gradually become unsynced after about a year
- 2. OTPs with minor time differences can still be used as it does not impact payment**
 - a. Since both clock in and out are affected, the total length of time is the same and can be managed if staff works with one participant
 - b. This may cause overlapping shifts if two participants served
- 3. If a significant change is noticed, please return devices to MDH**

Services Rendered Report

The Service Rendered Report has helpful information when following up with participants or if there are service issues:

- **Service Date** – The CCS can review service dates or general service delivery schedule the participant or their representative
- **Agency Name** – Identify agency providing services on a given date
- **Staff Name** – The CCS can see which staff person provided the service and note any concerns
- **Start Time and End Time**- The CCS can review to note that general service times match the participant's or their representative's expectations
- **Service Duration (hours)**: Low service hours in comparison to the service authorization could be an indicator that the provider agency is not providing the expected hours of service.

Thank you for attending!

Contact the MDH ISAS Team at:

- **Email:** MDH.ISAShelp@maryland.gov
- **Phone:** 410-767-1719

Questions?